User Manual: **Weekly Time Card MashApp**

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1. Introduction

This user manual is designed to guide you through using the **Weekly Timecard** MashApp solution to manage the projects of your organization. This MashApp was built using **Composer**, a MashApp tool from **Cordys Process Factory** (**CPF**).

Usually, when you have a manual weekly timecard approval system, the bottlenecks are many. For example, the long tedious procedures are time-consuming and taxing, which makes it difficult to manage. Moreover, you could lose your valuable clients to your competitor due to long cycle time.

To avoid such bottlenecks, we are providing the **Weekly Timecard** MashApp, which will help you:

- Reduce cycle time
- Add value and quality to your service

To use the **Weekly Timecard** MashApp, you need to first set up organization data such as application users and the external user and then set up MashApp **Master Data** such as week details, profile details, company details, and all tasks.

After setting up the required data, you can use the MashApp to manage the weekly timecard process. You can create and submit new weekly timecards, approve them, and also add weekly timecards to iGoogle. You can also monitor data through charts and reports.

Create Weekly Timecard
Weekly Timecard MashApp User Manual
Monitor Weekly Timecard Data
Approve Weekly Timecard
Add Weekly Timecard Gadget to iGoogle

2. Setting up Organizational Details

You need to set up organizational details such as application users and external users.

2.1 Creating Application Users

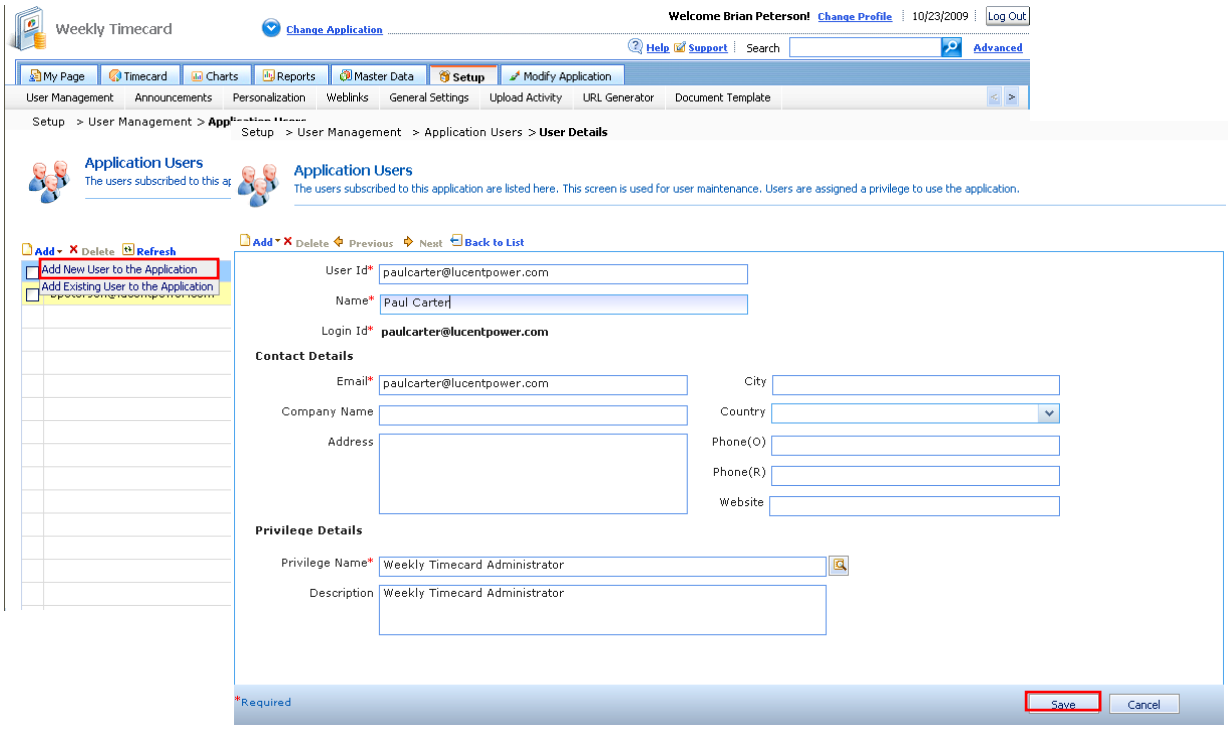
You need to create application users to enable users in your organization to access the **Weekly Timecard** MashApp. Do the following to set up application users.

1. Click **Setup** → **User Management**. The **User Management** page appears.
2. Click **Go to** for **Application Users**. The **Application Users** page appears, displaying a list of existing application users.
3. Create an application user. Do the following.
   a. Click **Add** and select **Add New User to the Application**.
   b. In the **User Id** field, type the unique id of the user in the form of a valid email address. For example, "lmiller@radiantpower.com". This email address is populated in the **Login Id** and **Email** fields respectively.

      The credentials required to access the **Weekly Timecard** MashApp will be sent to you via email.

      > ***Note**: You cannot modify the **Login Id**.*

   c. Provide the required details of the application user such as **Name** and **Contact Details**.
   d. Assign a privilege to the user to access the **Weekly Timecard** MashApp. Click for **Privilege Name**. The **Application Privileges** dialog box appears.
   e. Select **Weekly Timecard Administrator** and click **OK**. The privilege is assigned. The description of the privilege appears in the **Description** field.



An application user is created and the required privilege is assigned to the user. As soon as the user is added, he or she receives an email with the **Login Id** and **Password** required to log on to the **Weekly Timecard** MashApp.

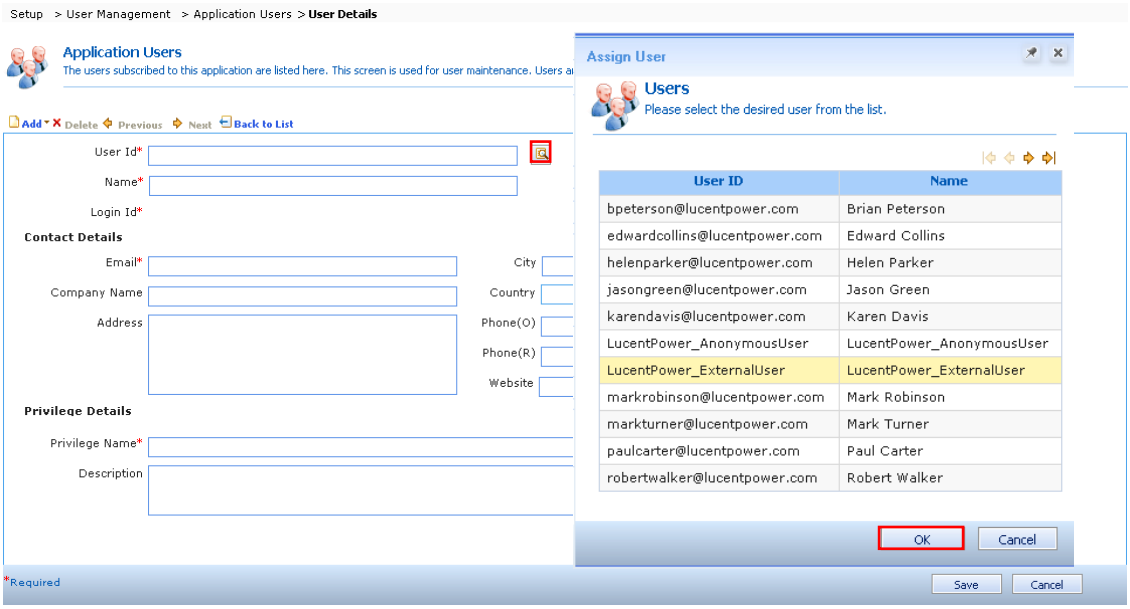
This application user is also an organization user. So, you can grant access to this user to other applications in the organization through the **Setup** tab for those applications using the **Add Existing User to the Application** option.

You have created an application user successfully.

2.2 Adding the Default External User

To send tasks to clients who are external to your organization, you need to add the default external user, <OrganizationName_ExternalUser> to your application. This is a system user that is created for your organization. To add this default user to your application, do the following.

1. Click **Setup** → **User Management**. The **User Management** page appears.
2. Click **Go to** for **Application Users**. The **Application Users** page appears.
3. Click **Add** and select **Add Existing Users to the Application**.
4. Click for **User ID**, select the default external user <OrganizationName_ExternalUser>, and click **OK**.



5. Then, click **Save**.

You have added the default external user to your application successfully. Now, you can send tasks to clients who are external to your organization.

3. Setting up Master Data

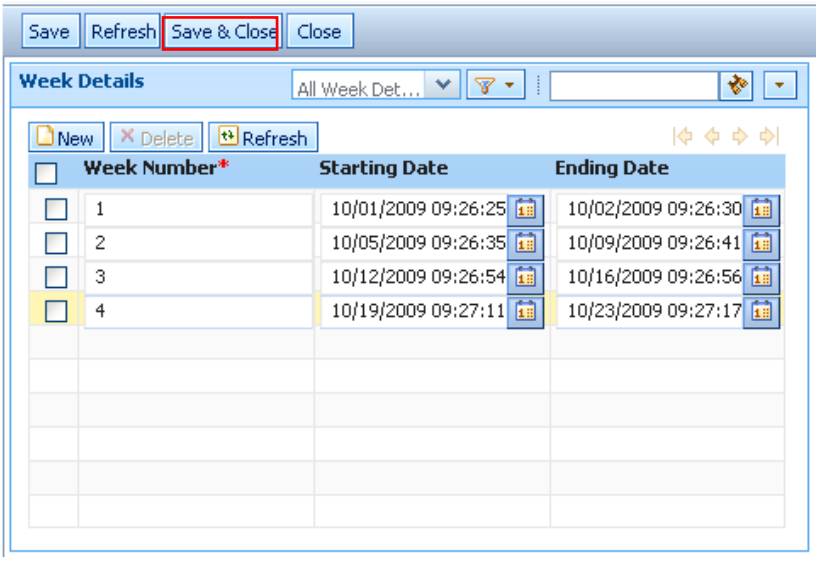
> ***Note**: You can set up **Master Data** only if you are assigned the **Weekly Timecard Administrator** privilege.*

You need to set up the **Master Data** that is required for the functioning of the **Weekly Timecard** MashApp.

3.1 Week Details

You can add week details that are required to submit weekly timecard. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Week Details**. The **Week Details** form appears.
3. Click **New** to add the details for a new week.
4. In the **Week Number** field, provide a number for the week.
5. Click for **Starting Date**, select the start date for the week.
6. Click for **Ending Date**, select the end date for the week.



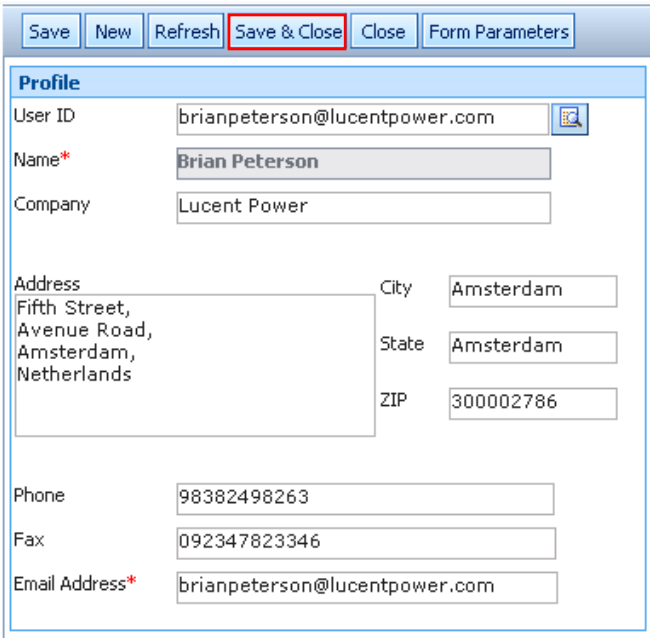
7. Click **Save & Close**.

You have added week details successfully.

3.2 Profile Details

You need to add the profile details, which need to be used in the application. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Profile Details**. The **Profile Details** form appears.
3. Click **New** to add the details for a new profile.
4. Click for **User ID**, select an organization user, and click **OK**. The **Name** field is automatically populated.
5. In the **Address** field, provide the address of the contact.
6. Provide other details such as **City**, **State**, **Email Address**, etc.



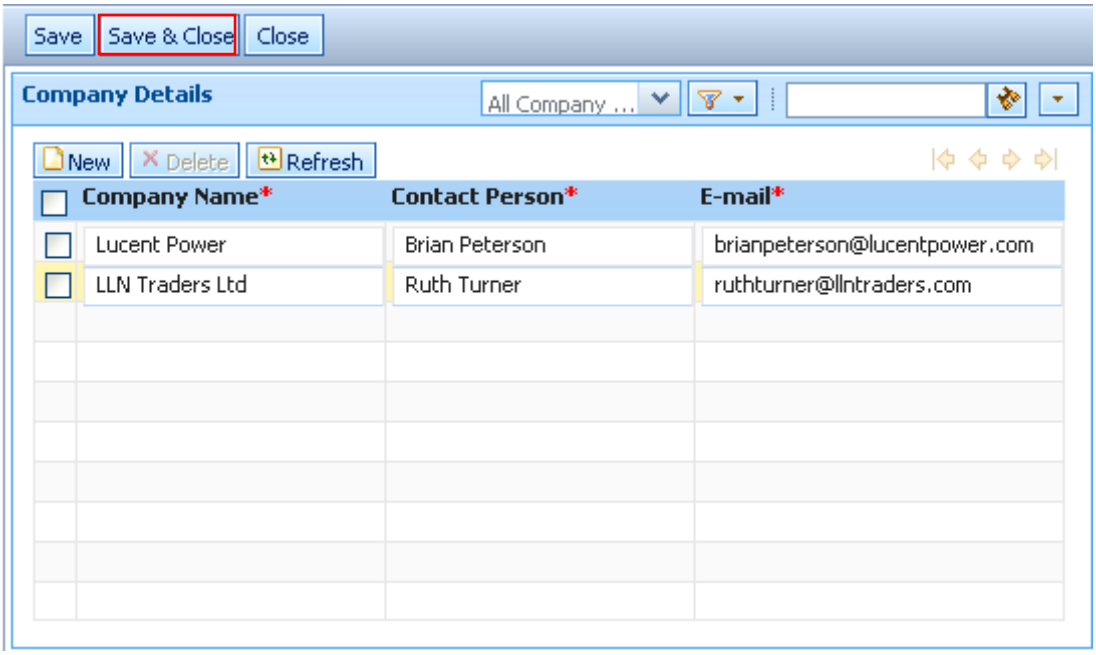
7. Click **Save & Close**.

You have added profile details successfully.

3.3 Company Details

You need to add all the company details needed to submit weekly timecards. Do the following to add company details.

1. Click the **Master Data** tab.
2. Click **View** for **Company Details**. The **Company Details** form appears.
3. Then, click **New** to add a new company detail.
4. In the **Company Name** field, provide the name of the company.
5. In the **Contact Person** field, provide the name of the contact person for the company.
6. In the **E-mail** field, provide the email ID of the contact person.



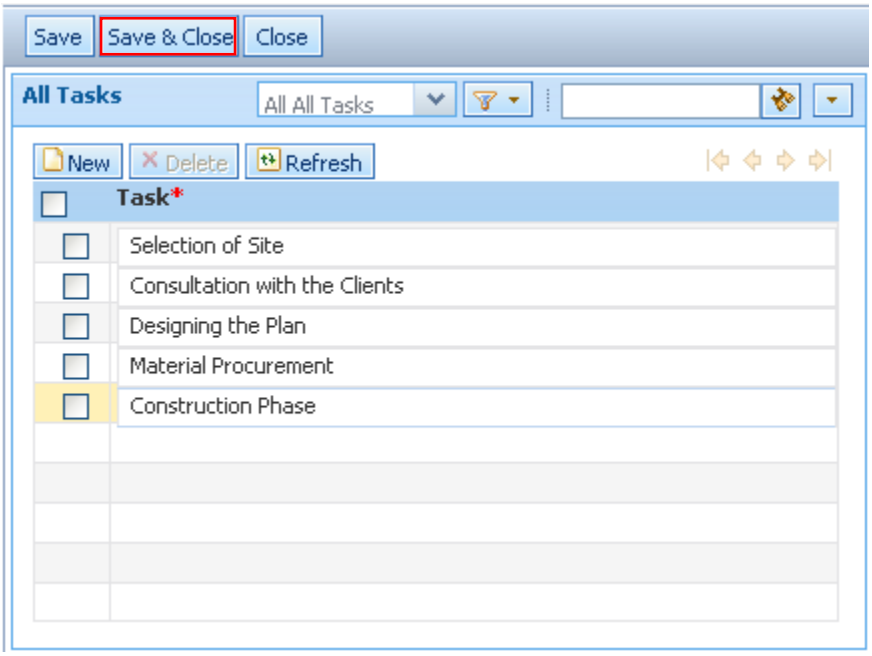
7. Click **Save & Close**.

You have added company details successfully.

3.4 All Tasks

You need to add all the tasks, which are to be included in the weekly timecard. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **All Tasks**. The **All Tasks** form appears.
3. Click **New** to add a new task.
4. In the **Task** field, provide the task.



5. Click **Save & Close**.

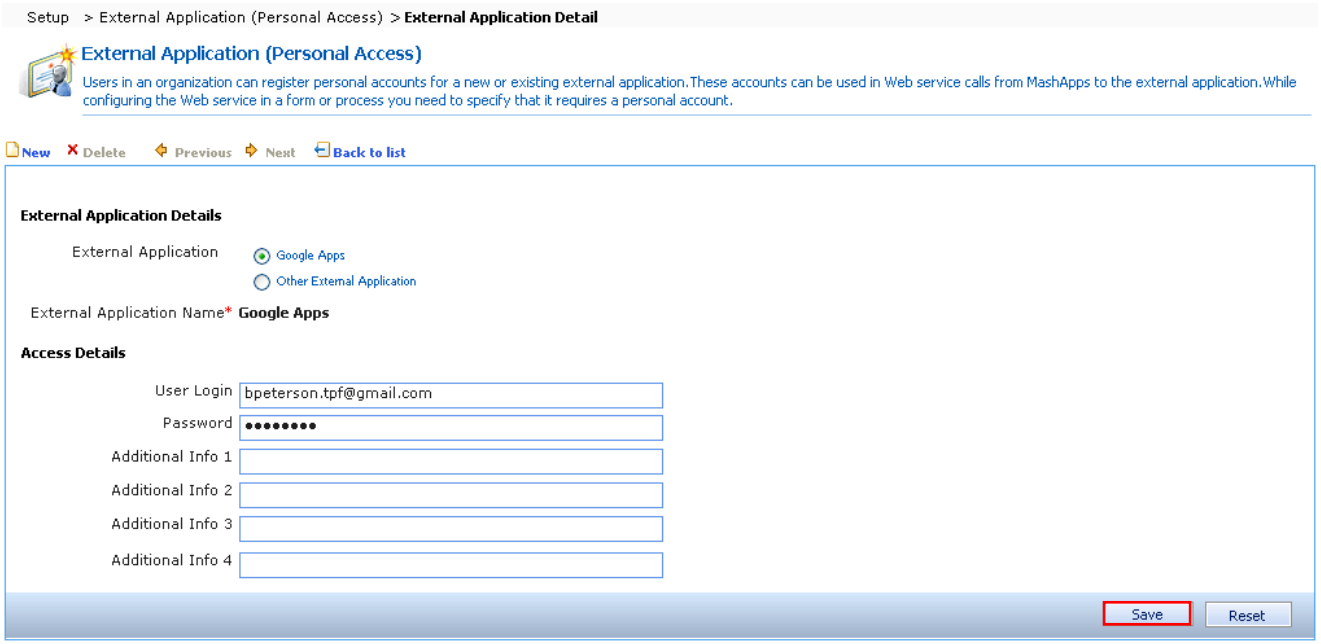
You have added all tasks successfully.

4. Registering Access Details for Google Apps

Firstly, you need to register your Google account credentials. This will enable integration between **Google Apps** and **Cordys Process Factory**.

You can set up a personal account for access to **Google Apps** through the **Setup** tab. Do the following.

1. Click **Setup**. The Setup page appears.
2. Click **Go to** for **External Application (Personal Access)**.
3. In the **External Application (Personal Access)** page that appears, do the following.
   a. Click **New**.
   b. **Google Apps** is the default selected option under **External Application Details**. This is the option you need to select to register your personal access details for **Google Apps**.
   c. Under **Access Details**, provide your **Login** and **Password** that you use to access your personal Google account.


Setup > External Application (Personal Access) > External Application Detail
External Application (Personal Access)
Users in an organization can register personal accounts for a new or existing external application. These accounts can be used in Web service calls from MashApps to the external application. While configuring the Web service in a form or process you need to specify that it requires a personal account.
New
Delete
Previous
Next
Back to list
External Application Details
External Application
Google Apps
Other External Application
External Application Name* Google Apps
Access Details
User Login
bpeterson.tpf@gmail.com
Password
Additional Info 1
Additional Info 2
Additional Info 3
Additional Info 4
Save
Reset

   d. Click **Save**.

Your personal Google account is registered to integrate between **Google Apps** and **Cordys Process Factory**.

> ***Note**: The Google account credentials you provided are secure.*

5. Copying and Customizing the Weekly Timecard Spreadsheet Template

This MashApp allows users to maintain weekly timecard data in a Google spreadsheet to back up data or take printouts or share it with others.

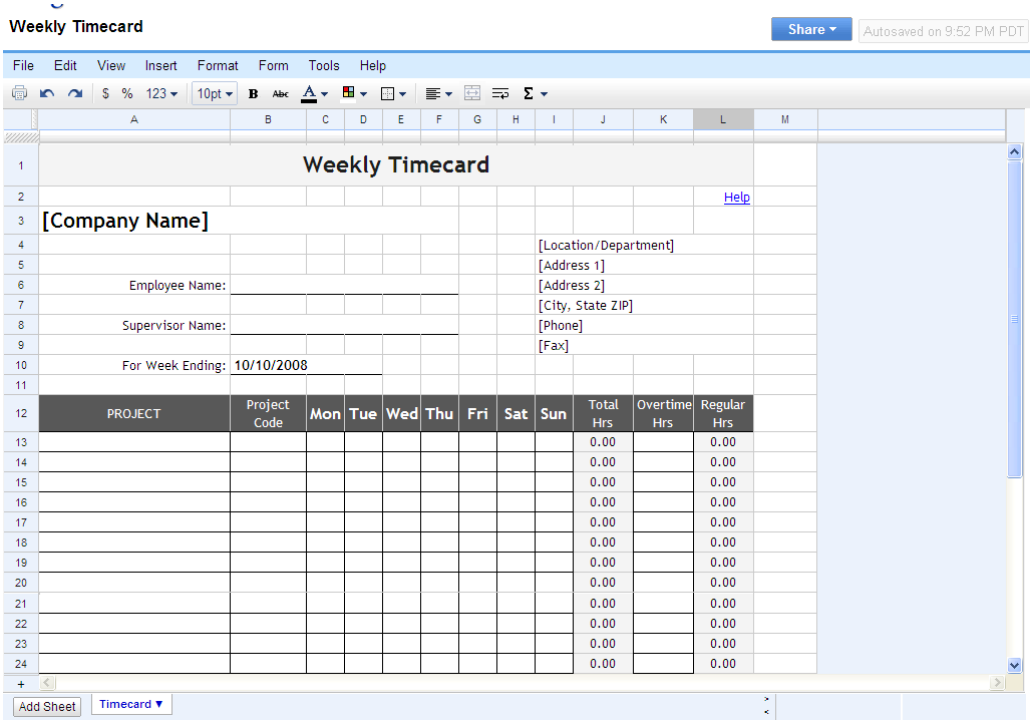
You need to copy the Google spreadsheet template to your Google account. You can also customize the template to add your company logo, if required.

***Note**:*

- *This is a one-time activity to be performed by the Weekly Timecard Administrator.*
- *Customize the spreadsheet by providing the company logo only. It is recommended not to make any other modifications.*

Do the following to copy the weekly timecard spreadsheet template and customize it.

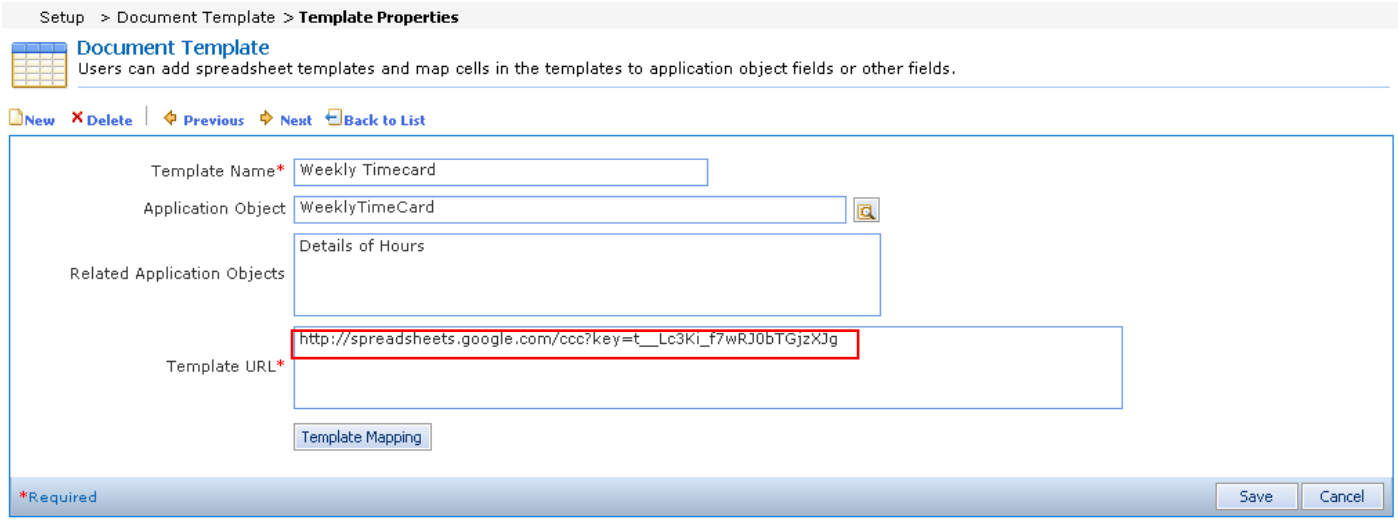
1. Go to the URL "http://spreadsheets.google.com/ccc?key=0AnSQ2k18PoezdHhuSC1NbTBWMGpUWTFqRjFBQjBqS3c&hl=e".
2. Click **File → Create a copy**. Provide a file name and click **OK**. This will create a copy of the weekly timecard spreadsheet template in your Google account.
3. In the **Company Logo** field, provide your company logo.



4. Click **Share** to share the spreadsheet with the users you want to share.

Now, you need to update the spreadsheet URL in your **Cordys Process Factory** account. Copy the URL of the spreadsheet to which you have made changes from your Google account and do the following in **Cordys Process Factory**.

1. Click the **Setup** tab.
2. Click **Go to** for **Document Template**. The **Document Template** page appears.
3. Double-click the existing document template. The **Template Properties** page appears.
4. In the **Template URL** field, paste the URL of the spreadsheet template that you copied and customized in your Google account.



5. Click **Save**.

6. Creating a Weekly Timecard

Once you have set up the **Master Data** and registered the access details for Google, you can create a weekly timecard. Do the following.

1. Click the **Timecard** tab.
2. Click **View** for **Weekly Timecard**.
3. Click **Profile**. The **My Profile** form appears. If you have not added your profile details in the **Master Data**, you can add it here. Do the following.
   a. Click **New** to add your profile details.
   b. Click for **User ID**, select the user ID with which you have logged on to the application, and click **OK**.
   c. Provide other details, such as **Address**, **Phone**, **Email Address**, etc.
   d. Click **Save & Close**.
4. In the **Weekly Timecard** section, do the following.
   a. Click for **Week**, select the week number, and click **OK**.
   b. Click for **Year**, select the year, and click **OK**.
   c. Click for **Client Name**, select a client, and click **OK**. You can also add new clients, if required.
   d. You can add attachments, if required. Do the following to add an attachment.
      i) Click **Add Attachments**.
      ii) Provide the **File Path**.
      iii) Provide a **Comment Title** and provide text for the description.
      iv) Click **Save**.
5. Click **Save**.
6. On the **Hourly Details for Selected Record** tab, do the following.
   a. Click **New** to add hourly details for a task.

b. Click for **Task**, select a task, and click **OK**.

c. Provide the hours worked in the **Sun**, **Mon**, **Tue**, etc fields respectively. The **Total** field is automatically populated.

d. In the **O.T Hrs** field, provide the over-time hours worked, if any.

7. Click **Save**.
8. On the **Create and Send Spreadsheet for Selected Record** tab, do the following.
   a. There are two options to create and send spreadsheet:
      - **New**: This option creates a new spreadsheet.
      - **Existing**: This option allows you to include the weekly timecard data to the existing spreadsheet. Do the following.
        i) Click the **Setup** tab.
        ii) Click **Go to** for **Document Template**. The **Document Template** page appears.
        iii) Double-click the existing document template. The **Template Properties** page appears.
        iv) Copy the URL in the **Template URL** field.
        v) Then, click the **Timecard** tab.
        vi) Click **View** for **Weekly Timecard**.
        vii) On the **Create and Send Spreadsheet for Selected Record** tab, paste the URL in the Spreadsheet URL field.
   b. Click **Write Spreadsheet**.
9. In the **Weekly Timecard** section, click **Refresh**. The spreadsheet created appears in the **Spreadsheet URL** field.
10. Now, select a send option to send the spreadsheet. The following options are available:
    a. **Share Spreadsheet**: You can share the spreadsheet created with the Share option.
    b. **Send as an Attachment**: You can send the spreadsheet as an attachment. Do the following.
       i) In the **Weekly Timecard** section, click the spreadsheet URL corresponding to the weekly timecard you want to send as an attachment, and save it to the desktop.
       ii) Click **Attachments**.
       iii) Then, click **Add Attachments**.
       v) Provide the **File Path**.
       vi) Provide a **Comment Title** and provide text for the description.
       iv) Click **Save**.
    c. **Send as a Form**: You can send this spreadsheet as a form
11. Click **Submit**.

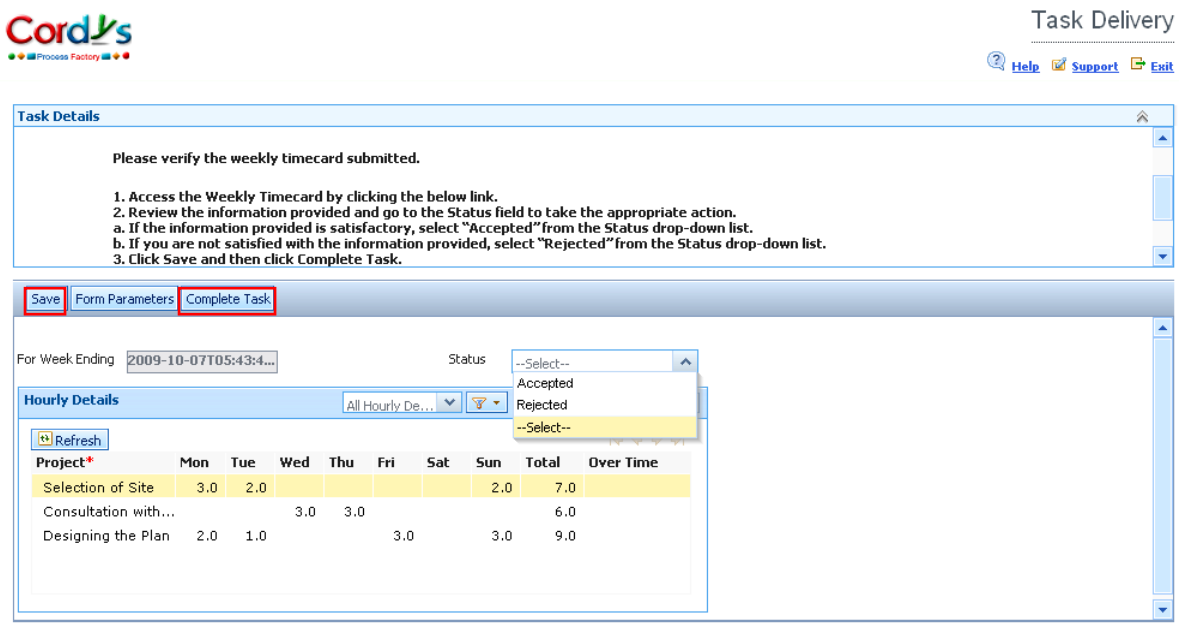
The task of approving the weekly timecard is sent to the client successfully.

7. Approving a Weekly Timecard

The client to whom the task is assigned gets a notification via email, which is available through **My Page → My Tasks**. The client gets a link and password via email to access the task.

Do the following to complete the task.

1. Review the weekly timecard details.
2. In the **Status** drop-down list, select one of the following:
   - **Accepted**: If accepted, a notification is sent to the person who submitted the weekly timecard.
   - **Rejected**: If rejected, a notification is sent to the person who submitted the weekly timecard.


Task Delivery
Help
Support
Exit
Task Details
Please verify the weekly timecard submitted.
1. Access the Weekly Timecard by clicking the below link.
2. Review the information provided and go to the Status field to take the appropriate action.
a. If the information provided is satisfactory, select "Accepted" from the Status drop-down list.
b. If you are not satisfied with the information provided, select "Rejected" from the Status drop-down list.
3. Click Save and then click Complete Task.
Save
Form Parameters
Complete Task
For Week Ending
2009-10-07T05:43:4...
Status
--Select--
Accepted
Rejected
--Select--
Hourly Details
All Hourly De...
Refresh
Project* Mon Tue Wed Thu Fri Sat Sun Total Over Time
Selection of Site 3.0 2.0 2.0 7.0
Consultation with... 3.0 3.0 6.0
Designing the Plan 2.0 1.0 3.0 3.0 9.0

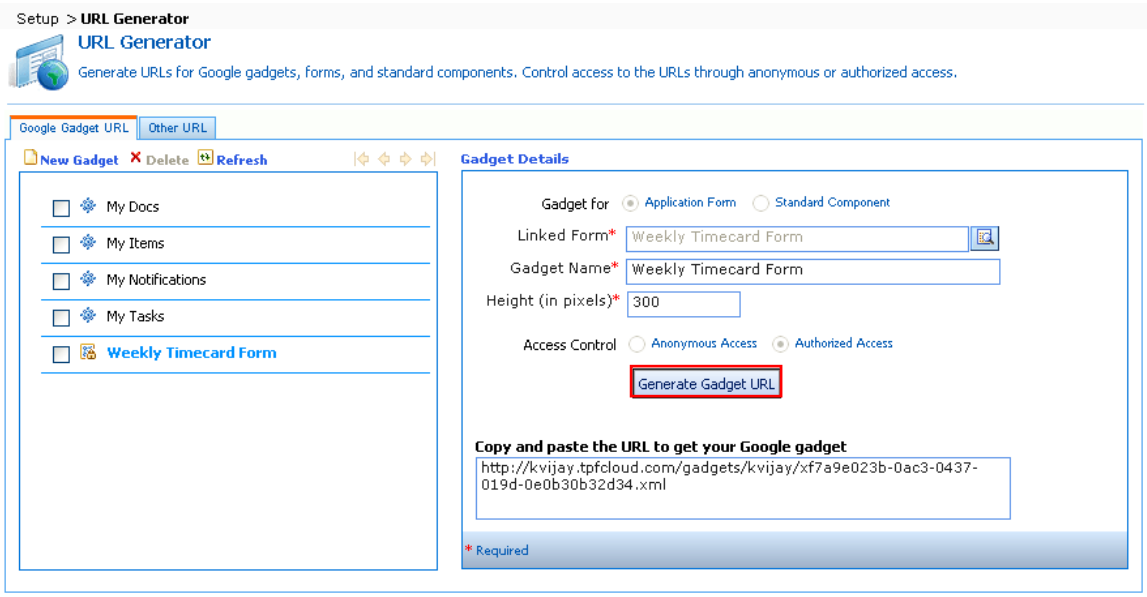
3. Click **Save**.
4. Then, click **Complete Task**.

You have completed the task of approving the weekly timecard successfully.

8. Adding the Weekly Timecard to iGoogle

You can add the weekly timecard to iGoooogle. Do the following.

1. Click **Setup** → **URL Generator**.
2. Click **Go to** for **URL Generator**. The **URL Generator** page appears.
3. On the **Google Gadget URL** tab, click **New Gadget** to add a new gadget.
4. In the **Gadget Details** section, do the following.
   a. **Application Form** is the default option for **Gadget for**.
   b. Click for **Linked Form**, select the **Purchase Order** form, and click **OK**.
   c. Select **Authorized Access** radio button for **Access Control**.



You have generated the URL successfully. Use this generated URL and add this to your iGoogle homepage. Similarly, you can use any form as a gadget in iGoogle by repeating the above steps.

9. Reporting and Monitoring

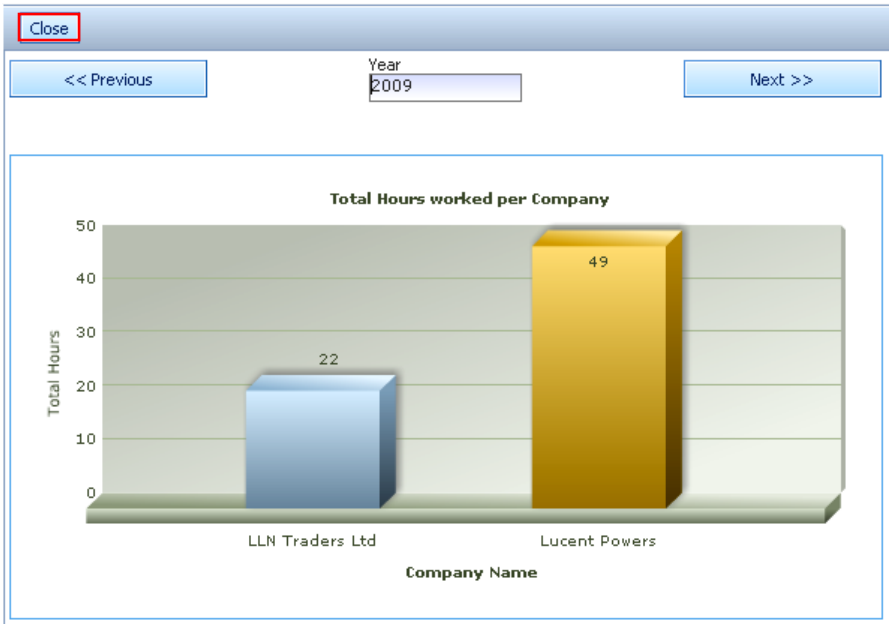
The **Weekly Timecard** MashApp enables you to monitor weekly timecard data through various forms, charts, and reports.

9.1 Charts

On the **Charts** tab, you can view charts that display weekly timecard data.

For example, you can view the **Total Time Spent per Company** chart to view the total time spent per company. Do the following.

1. Click the **Charts** tab.
2. Click **View** for **Total Time Spent per Company**. The **Total Time Spent per Company** chart appears, displaying the total time spent per company. You can modify the **Year** field to view the status for another year.



3. Click **Close**.

You can also view the **Total Time Spent for a Company** chart on the **Charts** tab.

9.2 Reports

On the **Reports** tab, you can run various reports on weekly timecard.

For example, you can run the **All Timecards per Company** report to view all timecards per company. Do the following.

1. Click the **Reports** tab.
2. Click **Run** for **All Timecards per Company**. The **Report Wizard** appears.
3. Click **Run Report**.
4. Then, click **Download Report**. The report appears, displaying all timecards per company.

All Time Cards per Company

23/10/2009

Year	Week	Company Name	Task	Total Hrs
2009	1	LLN Traders Ltd	Selection of Site	7
			Consultation with the Clients	6
			Designing the Plan	9
	3	Lucent Powers	Selection of Site	28
			Material Procurement	21
Grand Total				71
Grand Average				14.2
Grand Maximum				28
Grand Minimum				6

5

10. Conclusion

In this user manual, you learnt how to set up application users and **Master Data** for the successful functioning of the MashApp. You learnt how to create and submit weekly timecard and to get it approved from the client. You also learnt how to add weekly timecard to iGoogle. You even got a glimpse of how to monitor data through various charts and reports that are readily available to you.

11. Contact Us

To report issues or send feedback, contact us at: customercare@theprocessfactory.com